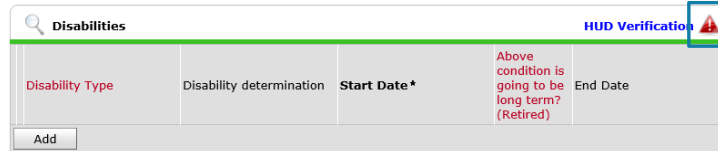


# Working with Sub-Assessments

## Creating New Sub-Assessment Records

HUD Verification sub-assessments should always have a green check mark by them. If you see this red triangle, click on it to complete the records in that table.



Clicking on it will open up a window where you can assign every HUD-required record type a value. Click No at the top to set all records to No, and then change them to Yes as appropriate.

**HUD Verification: Disabilities for 04/25/2019**

*Per Disability Type, the current records for Disabilities as of 04/25/2019 are displayed below. Any previous records for Disabilities not overlapping as of this date are not displayed. In the event that multiple records exist per Disability Type as of 04/25/2019, records containing "Yes" values will be displayed and take precedence for reporting purposes.*

Select the Disability determination value for all incomplete Disability Type records

No (HUD)  
 Client doesn't know (HUD)  
 Client refused (HUD)  
 Data not collected (HUD)  
 Incomplete

Disability Type	Disability determination					
	Yes (HUD)	No (HUD)	Client doesn't know (HUD)	Client refused (HUD)	Data not collected (HUD)	Incomplete
Alcohol Abuse (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Both Alcohol and Drug Abuse (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Chronic Health Condition (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Developmental (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Drug Abuse (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
HIV/AIDS (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Mental Health Problem (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Physical (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

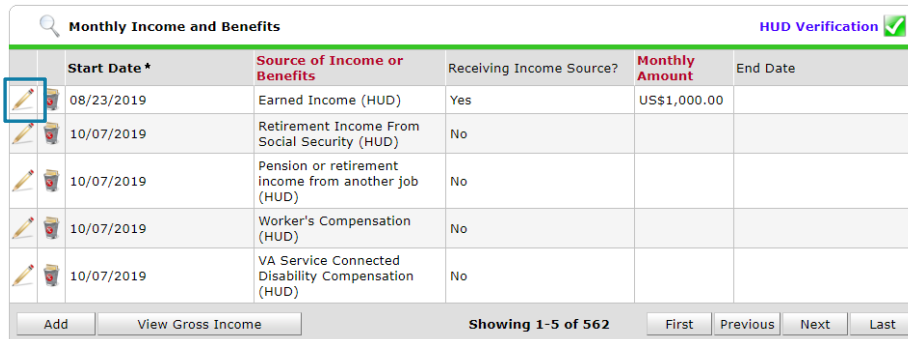
- Do not collect information on clients' HIV/AIDS status in ServicePoint.
- All information is recorded based on best available data, whether that is the client's self report or documentation that you have available.
- No additional information is required in the window that pops up when you change a record to Yes, just click Save and Exit. Exception: the amount is required for income with a Yes response.






You have completed a sub-assessment!

Please email [hmisrequest@councilforthehomeless](mailto:hmisrequest@councilforthehomeless) with any additional questions.

## Updating Existing Sub-Assessment Records

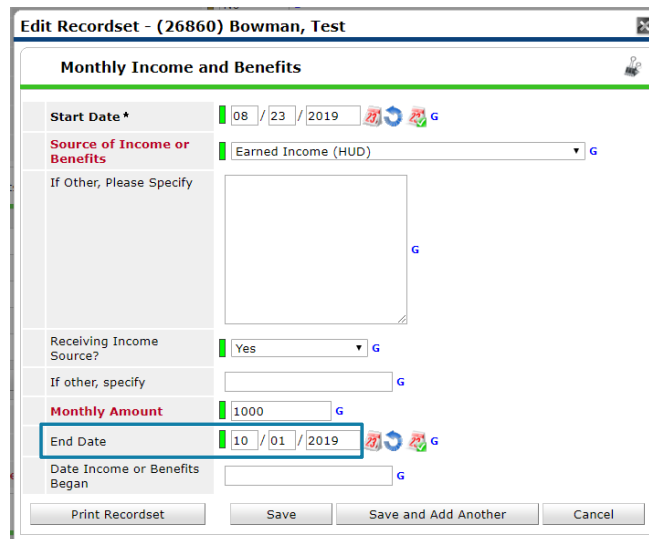
Sub-assessments must be updated by closing out the old record and creating a new record. To close out an old “Yes” record, click the edit pencil by the old record.



	Start Date *	Source of Income or Benefits	Receiving Income Source?	Monthly Amount	End Date
	08/23/2019	Earned Income (HUD)	Yes	US\$1,000.00	
	10/07/2019	Retirement Income From Social Security (HUD)	No		
	10/07/2019	Pension or retirement income from another job (HUD)	No		
	10/07/2019	Worker's Compensation (HUD)	No		
	10/07/2019	VA Service Connected Disability Compensation (HUD)	No		

Buttons: Add, View Gross Income, Showing 1-5 of 562, First, Previous, Next, Last

In the pop-up that appears, set an approximate end date. Here is a closed-out record for \$1,000 in earned income. Click Save when your record looks correct.



**Edit Recordset - (26860) Bowman, Test**

**Monthly Income and Benefits**

Start Date \* 08 / 23 / 2019

Source of Income or Benefits Earned Income (HUD)

If Other, Please Specify

Receiving Income Source? Yes

If other, specify

Monthly Amount 1000

End Date 10 / 01 / 2019

Date Income or Benefits Began

Buttons: Print Recordset, Save, Save and Add Another, Cancel

Now click the Add button on the bottom left of the sub-assessment. The new record type should match the one you just closed (e.g. if you closed a No record for food stamps because the client got food stamps, the new record type should also be food stamps). Set “Receiving Income Source”/”Receiving Benefit”/”Covered” to the correct, updated answer, and set an amount if you are in an income record. Click Save when it looks correct.

You have updated a sub-assessment record!